Manitoba

BUREAU OF STATISTICS

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MANITOBA INDUSTRIAL SERVICES

A STATISTICAL PROFILE

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EXECUTIVE SUMMARY

There are 334 firms in the industrial services sector: 66 machine shops, 120 welding shops and 148 repair shops.

Of the 332 firms reporting employment, 253 (76.2%) reported less than 10 full-time employees. Only 16 firms (4.8%) reported 50 or more employees.

These industrial service firms account for an estimated full-time employment of 4,660 persons.

Of the 318 firms reporting gross annual sales, there are 103 firms (32.5%) reporting sales of $25 thousand to $99 thousand, 106 firms (33.3%) reporting sales of $100 thousand to $499 thousand. There are 11 firms (3.5%) reporting sales of $5 million or more.

The industrial service firms account for an estimated $222 million annual gross sales of which $210 million are estimated to be domestic.

There are 184 firms (55.1%) located in Winnipeg, 37 (11.1%) in the Southwest region and 31 (9.3%) in the Southeast region. The remaining 82 firms (24.6%) are located in the other five Manitoba regions.

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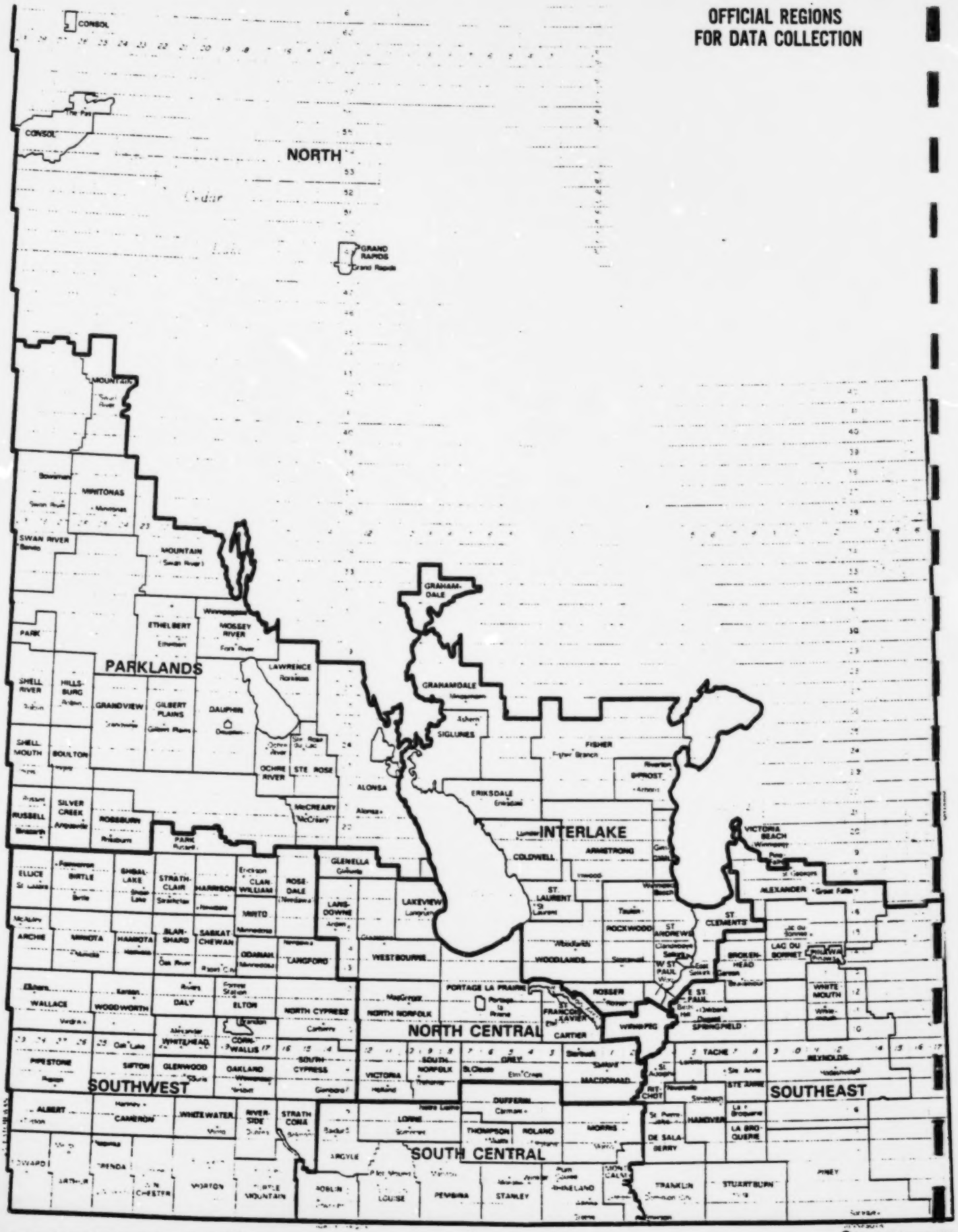
OFFICIAL REGIONS FOR DATA COLLECTION



Cartography by Surveys and Mapping Branch, Manitoba-1980

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I. INTRODUCTION

The following article presents the major statistical characteristics of the industrial service sector firms. The firms responding to the 1985 survey were comprised of machine shops, welding shops and repair shops. A copy of the questionnaire is included as Appendix A.

Geographic data, company information, type of business, employment, sales volumes and location as well as the firm's capabilities, have been data captured.

This article will provides an overall profile of all the firms, as well as profiles of machine shops, welding shops and repair shops. A brief profile by employment size is also presented. Detailed tables are contained in Appendix B.

DEFINITIONS:

Machine Shop: Machine shops are primarily engaged in producing machine parts and equipment, other than complete machines, for the trade.

Welding Shop: Welding shops are primarily engaged in welding.

Repair Shop: Repair shops are primarily engaged in harness repair, locksmithing, gunsmithing, lawn mower sharpening, knife and scissors sharpening, armature rewinding and electric motor repair, oil burner service and other repair activities, not elsewhere classified.

To obtain further information or custom tabulations on the industrial service firms, please contact David Greenwood at 945-2989.

II. ALL FIRMS

There are 334 firms in the industrial services sector: 66 (19.8%) machine shops, 120 (35.9%) welding shops and 148 (44.3%) repair shops. Of these, 184 firms (55.1%) are located in Winnipeg, 37 firms (11.1%) in the Southwest region and 31 firms (9.3%) in the Southeast region. The other 4 regions account for the remaining 82 firms (24.6%).

There were 332 firms that reported full-time employment: 203 firms (61.1%) reported 1 to 4 full-time employees, 50 firms (15.1%) reported 5 to 9 employees and 30 firms (9.0%) reported 20 to 49 employees. There were 331 firms reporting full-time production employees. Of these, 229 firms (69.2%) reported 1 to 4 production employees, 44 firms (13.3%) reported 5 to 9 production employees and 23 firms (6.9%) reported 10 to 14 production employees. The other categories accounted for 35 firms (10.6%). All firms account for an estimate of 4,660 full-time employees in the industrial service sector.

There were 318 firms reporting total annual sales. Of these, 103 firms (32.4%) reported annual sales of $25,000 to $99,000 and 106 firms (33.3%) reported annual sales of $100,000 to $499,000. There were 11 firms (3.5%) reporting annual sales of $5,000,000 or more. Of these 318 firms, 103 firms reported annual domestic sales of $25,000 to $99,000 and 109 firms (34.3%) reported annual domestic sales of $100,000 to $499,000. All the industrial services firms account for an estimated $222 million total annual sales.

There are 63 firms reporting machine shop, repair and welding capabilities, 109 firms reporting two of these three capabilities and 162 firms reporting one of the three capabilities.

Of the 216 firms reporting welding capabilities, 49 firms (22.7%) were capable of providing three types of welding, 37 firms (17.1%) provided 4 types of welding, 61 firms (28.2%) provided 5 types of welding and 36 (16.7%) reported 6 types of welding.

Of the 141 firms reporting machine shop capabilities, only 13 firms (9.2%) reported less than 7 products or processes they could provide. The other 128 firms reported capability of providing up to 17 products or processes.

Of the 212 firms reporting repair shop capabilities, 116 firms (54.7%) reported being capable of repairing less than 5 "types" of equipment.

Of the 334 industrial service firms, all had Canadian sales, even though two firms reported no Manitoba sales. There are 151 firms (45.2%) with sales to Saskatchewan, 114 (34.1%) with sales to Ontario and 59 firms (17.7%) with sales to Alberta. There are also 307 firms (91.9%) that reported no export sales. Of the 37 firms that did report export sales, 24 firms (64.9%) sold to the USA.

III. INDUSTRIAL SERVICE FIRMS BY EMPLOYMENT SIZE

A. LESS THAN 10 EMPLOYEES:

There are 253 (76.2%) of the 332 industrial service firms reporting employment that employ less than 10 full-time employees. Of these 253 "small" firms, 114 firms (45.1%) are located in Winnipeg, 33 firms (13.0%) are located in the Southwest region and 31 firms (31%) are located in the Southeast region. There are 41 firms (16.2%) coded as machine shops, 102 firms (40.3%) as welding shops and 110 firms (43.5%) as repair shops.

Of these 253 small firms, 241 reported total annual sales. There are 101 firms (41.9%) reported total sales in the $25 thousand to $99 thousand category and 92 firms (38.1%) reported total sales in the $100 thousand to $499 thousand category. These 253 firms are estimated to have total annual sales of $49 million with domestic sales of $48 million. The 253 firms account for an estimated 860 full-time employees in the industrial services sector: this implies that 76.2% of the firms account for only 18.5% of the industrial services full-time employment.

Of these 253 firms, 155 firms (61.3%) have welding capability, 92 firms (36.4%)have machine shop capability and 153 firms (60.5%) have repair shop capability.

All firms sell domestically: 252 firms (99.6%) have Manitoba sales, 94 firms (37.2%) have sales to Saskatchewan and 62 firms (24.5%) have sales to Ontario. There are 10 firms reporting export sales and nine of these export to the USA.

There are 155 of these small firms that report average capabilities of 4 types of welding, 92 firms that report machine shop capabilities with an average of 10 processes or products and there are 153 firms reporting repair shop capabilities with an average of 5 products.

B. 10 EMPLOYEES OR MORE:

There are 79 firms (23.8% of the 332 industrial service firms reporting employment) that employ 10 or more full-time employees. Of these 79 firms, 68 (86.1%) are located in the Winnipeg region.

There are 76 of the 79 firms reporting total annual sales. There are 32 firms (42.1%) reporting total annual sales in the $1,000 thousand to $2,999 thousand. There are also 11 firms reporting sales of $5 million or more. The firms employing 10 or more employees have an estimated total annual sales of $173 million, $162 million of which are domestic.

Of the 79 firms reporting full-time employees, there are 63 firms (79.7%)reporting employment in the 10 to 49 employee category. Only 16 firms reported 50 or more employees. These 79 firms employ an estimated 3,800 full-time employees.

There are 60 firms (75.9%) reporting welding capabilities: on average, these firms are capable of 4.8 types of welding. There are 49 firms (62.0%) reporting machine shop capabilities: on average, these firms are capable of 11.6 products or services. There are 58 firms reporting repair shop capabilities: on average these firms are capable of repairing 8 types of equipment.

IV. MACHINE SHOPS

There are 66 machine shops that responded to the 1985 Industrial Services questionnaire, 41 (62.1%) of which are located in Winnipeg. Of these 66 firms, 26 (39.4%) reported 1 to 4 full-time employees and 15 (22.7%) reported 5 to 9 full-time employees. There are three firms that reported more than one hundred full-time employees. An estimated 1,400 people are employed on a full-time basis by these 66 firms. The average (median) number of full-time employees per firm is 6.0.

Of the 65 firms reporting total sales, 28 firms (43.1%) reported total sales in the $100 thousand to $499 thousand category. There were 11 firms (16.9%) reporting sales of $1,000 thousand to $2,999 thousand, 10 firms (15.4%) reporting total sales of $500 thousand to $999 thousand and 10 firms (15.4%) reporting total sales of $25 thousand to $99 thousand. The total sales produced by these 66 firms is estimated to be $57 million of which $54 million are estimated to be domestic. The average (median) total sales per firm is $400 thousand.

The 47 machine shops reporting welding capabilities are capable of an average of 4.6 types of welding; the 66 machine shops are capable of an average of 12 processes or products; the 29 machine shops reporting repair shop capabilities are capable of an average of 9 "types" of equipment repair.

The 66 machine shops all had domestic sales: all 66 firms had Manitoba sales, 38 firms (57.6%) had sales to Saskatchewan, 29 firms (43.9%) had sales to Ontario and 15 firms (22.7%) has sales to Alberta. There were 13 machine shops that reported export sales and all 13 firms exported to the USA.

V. WELDING SHOPS

There were 120 firms classified as welding shops: 49 firms (40.8%) were located in Winnipeg, 22 firms (18.3%) were located in the Southwest region and 15 firms (12.5%) were in the Southeast region. Of the 119 firms reporting full-time employment, 91 firms (76.5%) reported 1 to 4 full-time employees and 11 firms (9.2%) reported 5 to 9 full-time employees. Only 3 firms reported 50 or more full-time employees: these 3 firms were located in the Winnipeg region. It is estimated that 1,160 persons are employed on a full-time basis by these 120 welding shops. The average (median) number of full-time employees for these welding shops is 3.1.

There were 113 welding shops reporting total annual sales. Of these 52 firms (46.0%) reported total sales of $25 thousand to $99 thousand, 29 firms (25.7%) reported sales of $100 thousand to $499 thousand and 18 firms (15.9%) reported sales of $1 thousand to $24 thousand. An estimate for the total annual sales of the 120 welding shops is $43 million. There are only 4 of these 120 firms reporting export sales. All 4 firms have reported annual export sales in the $1 thousand to $24 thousand category. The maximum amount for total annual export sales would therefore be less than $100 thousand. The average (median) total sales for the welding shops is $81 thousand.

The 120 welding shops reporting are capable of an average of 5 types of welding; the 43 welding shops reporting machine shop capabilities are capable of an average of 10.0 products or processes; the 34 welding shops reporting repair shop capabilities are capable of an average of 8 "types" of equipment repair.

Of the 120 welding shops, only one does not report Manitoba sales. There are 49 firms (40.8%) selling to Saskatchewan, 26 firms (21.7%) selling to Ontario and 25 firms (20.8%) selling to Alberta. There are only 4 welding shops reporting exports: 3 to the USA and 1 to Australia.

VI. REPAIR SHOPS

There are 148 repair shops that responded to the 1985 Industrial Services questionnaire. Of these 148, 94 firms (63.5%) are located in Winnipeg.

Of the 147 repair shops reporting full-time employment, 86 shops (58.5%) reported 1 to 4 full-time employees and 24 shops (16.3%) reported 5 to 9 full-time employees. There are 6 shops (4.1%) reporting fifty or more full-time employees. The 148 repair shops are estimated to employ 2,100 persons on a full-time basis. The average (median) number of full-time employees for the repair shops is 3.9.

There are 140 repair shops reporting total annual sales. Of these, 49 shops (35.0%) reported sales in the $100 thousand to $499 thousand category and 41 shops (29.2%) reported sales in the $25 thousand to $49 thousand category. There are 7 firms (5.0%) reporting sales of $5 million or more. It is estimated that these 148 repair shops' combined total sales are approximately $122 million: $113 million is considered domestic sales with the remaining $9 million being sales to other countries. The average (median) total sales for the repair shops is $304 thousand.

All of the 148 repair shops had some Canadian sales. One firm had no sales in Manitoba. There are 64 repair shops (43.2%) reporting sales to Saskatchewan and 59 repair shops (39.9%) reporting sales to Ontario. There are 10 repair shops reporting exports. Of these 8 shops export to the USA.

The 148 repair shops are capable of repairing an average of 5.0 types of equipment. There are 49 repair shops with welding capabilities: on average, these 49 shops are capable of 4 types of welding. There are also 32 repair shops with machine shop capabilities: on average, these are capable of 10 machining products or processes.

APPENDIX A

Manitoba
Industry, Trade and Technology
Winnipeg, Manitoba
R3C 3H8

MANITOBA SOURCING DIRECTORY

Company Profile
Industrial Services

SECTION A: GENERAL INFORMATION

1. Company Name

2. Mailing Address | 3. City | 4. Postal Code

5. Street Address | 6. City | 7. Postal Code

8. Telephone No. | 9. Telex No. | 10. Year Established | 11. Work Space Sq. Ft.

12. Alternate Company Name (If Applicable) | 13. Nature of Business

14. Name & Title of Contact Officer | 15. Name & Title of Chief Executive Officer

16. Total Number of Full Time Employees at the Present Time

1-4	5-9	10-14	15-19	20-49	50-99	100-249	250-499	500+
( )	( )	( )	( )	( )	( )	( )	( )	( )

17. Total Number of Full Time Production Employees at the Present Time

1-4	5-9	10-14	15-19	20-49	50-99	100-249	250-499	500+
( )	( )	( )	( )	( )	( )	( )	( )	( )

18. Annual Gross Sales ($000). Sales for Fiscal Year Ending in Previous 12 Months.

1-24	25-99	100-499	500-999	1,000-2,999	3,000-4,999	5,000+	Not Applicable
( )	( )	( )	( )	( )	( )	( )	( )

19. Annual Gross Sales ($000) Within Canada. Sales for Fiscal Year Ending in Previous 12 Months.

1-24	25-99	100-499	500-999	1,000-2,999	3,000-4,999	5,000+	Not Applicable
( )	( )	( )	( )	( )	( )	( )	( )

20. Annual Gross Sales ($000) Outside of Canada. Sales for Fiscal Year Ending in Previous 12 Months.

1-24	25-99	100-499	500-999	1,000-2,999	3,000-4,999	5,000+	Not Applicable
( )	( )	( )	( )	( )	( )	( )	( )

SECTION B: WELDING CAPABILITIES

21. Does your firm have full service WELDING capabilities? Yes ( ) No ( )
If No, please go to Section C.

22. Which of the following types of welding is your firm capable of providing?

	IN THE SHOP		ON SITE	
	YES	NO	YES	NO
Oxygen - Acetelyne	( )	( )	( )	( )
Manual Arc Welding	( )	( )	( )	( )
Gas Arc Welding (M.I.G.)	( )	( )	( )	( )
Tungsten Arc Welding (T.I.G.)	( )	( )	( )	( )
Submerged Arc Welding	( )	( )	( )	( )
Spray Welding	( )	( )	( )	( )
Pressure Welding	( )	( )	( )	( )
Custom Welding	( )	( )	( )	( )
Other (Please Specify)				
_____	( )	( )	( )	( )
_____	( )	( )	( )	( )

SECTION C: MACHINE SHOP CAPABILITIES

23. Does your firm have full service MACHINE SHOP capabilities? Yes ( ) No ( )
If No, please go to Section D.

24. Which of the following processes or products is your firm capable of providing?

( ) Turning
( ) Boring
( ) Drilling
( ) Milling
( ) Press Work
( ) Grinding
( ) Planing
( ) Straightening
( ) Balancing
( ) Honing
( ) Dies
( ) Jigs & Fixtures
( ) Metal Moulds
( ) Gear Cutting
( ) Dye Checking
( ) Custom Machine Design
( ) Custom Machining
( ) Other (Please Specify)
_____
_____

SECTION D: REPAIR SHOP CAPABILITIES

25. Does your firm have full service REPAIR SHOP capabilities? Yes ( ) No ( )

If No, please go to Section E.

26. Which of the following types of equipment is your firm capable of repairing?

If you work on a specific part or piec of equipment, please specify.

( ) Agriculture - Field Related _____

- Building Related _____

( ) Air Conditioning, Refrigeration, Heating _____

( ) Bakery, Beverage, Food Machinery _____

( ) Boring, Drilling, Excavating, Mining, Oil and Gas Machinery _____

( ) Compressors Air and Gas, Blowers and Vacuum Pumps _____

( ) Concrete Mixing and Construction Maintenance _____

( ) Domestic/Household Appliances _____

( ) Drag Lines _____

( ) Electric and Electronic Equipment Manufacturing _____

( ) Electric Motors and Generators _____

( ) Elevators and Escalators _____

( ) Engines - Automotive _____

( ) Engines - Diesel _____

( ) Engines - Marine _____

( ) Engine Rebuilding _____

( ) Filling, Bagging, Cartoning, and Bailing Machinery _____

( ) Foundry _____

( ) Heat Transfer _____

( ) Hydraulic Cylinders _____

( ) Hydraulic Power Transmission _____

( ) Hydraulic Pumps _____

( ) Hydraulic Valves _____

( ) Metal Manufacturing _____

( ) Printing Industry Machinery _____

( ) Pulp and Paper Industry Machinery _____

SECTION E: MARKETS

27. Please indicate the types of businesses your firm usually services.

( ) Agricultural
( ) Mining and Forestry
( ) Manufacturing
( ) Construction
( ) Wholesale/Retail Trade
( ) Government
( ) General Public
( ) Other (Please Specify)
_____
_____

28. If your firm has provided services for customers in other provinces within your last fiscal year, please indicate the provinces.

( ) Not Applicable
( ) Newfoundland
( ) Nova Scotia
( ) P.E.I.
( ) New Brunswick
( ) Quebec
( ) Ontario
( ) Manitoba
( ) Saskatchewan
( ) Alberta
( ) British Columbia
( ) N.W.T.
( ) Yukon

29. If your firm has provided services for customers in other countries within your last fiscal year, please indicate the areas.

( ) Not Applicable
( ) U.S.A.
( ) Mexico
( ) Central America
( ) South America
( ) European Economic Community
( ) Other Europe
( ) Asia
( ) Africa
( ) Australia
( ) Other (Please Specify)
_____

30. Does your firm have any certifications or accreditations? (eg. - C.S.A., A.S.M.E., U.L.C.) Yes ( ) No ( )

If yes, please specify.

_____

31. Comments: _____

_____

_____

_____

32. Completed By Title Telephone # Date

TABLE 1. NUMBER OF MANITOBA INDUSTRIAL SERVICE FIRMS BY EMPLOYMENT SIZE AND TYPE OF FIRM

EMPLOYMENT	MACHINE SHOPS		WELDING SHOPS		REPAIR SHOPS		TOTAL	
	NUMBER	%	NUMBER	%	NUMBER	%	NUMBER	%
N/A	0	0.0	1	0.8	1	0.7	2	0.6
1 TO 4	26	39.4	91	75.8	86	58.1	203	60.8
5 TO 9	15	22.7	11	9.2	24	16.2	50	15.0
10 TO 14	8	12.1	4	3.3	7	4.7	19	5.7
15 TO 19	2	3.0	4	3.3	8	5.4	14	4.2
20 TO 49	8	12.1	6	5.0	16	10.8	30	9.0
50 TO 99	4	6.1	2	1.7	3	2.0	9	2.7
100 TO 249	3	4.5	0	0.0	2	1.4	5	1.5
250 TO 499	0	0.0	1	0.8	1	0.7	2	0.6
TOTAL	66	100.0	120	100.0	148	100.0	334	100.0

DATA SOURCE : MANITOBA SOURCING DIRECTORY

MANITOBA BUREAU OF STATISTICS

SEPTEMBER, 1985

TABLE 2. NUMBER OF MANITOBA INDUSTRIAL SERVICE FIRMS BY TOTAL SALES AND TYPE OF FIRM

THOUSANDS $	MACHINE SHOPS		WELDING SHOPS		REPAIR SHOPS		TOTAL	
	NUMBER	%	NUMBER	%	NUMBER	%	NUMBER	%
N/A	2	3.0	7	5.8	8	5.4	17	5.1
1 TO 24	2	3.0	18	15.0	14	9.5	34	10.2
25 TO 99	10	15.2	52	43.3	41	27.7	103	30.8
100 TO 499	28	42.4	29	24.2	49	33.1	106	31.7
500 TO 999	10	15.2	6	5.0	11	7.4	27	8.1
1000 TO 2999	11	16.7	6	5.0	16	10.8	33	9.9
3000 TO 4999	1	1.5	0	0.0	2	1.4	3	0.9
5000 OR MORE	2	3.0	2	1.7	7	4.7	11	3.3
TOTAL	66	100.0	120	100.0	148	100.0	334	100.0

DATA SOURCE : MANITOBA SOURCING DIRECTORY

MANITOBA BUREAU OF STATISTICS

SEPTEMBER, 1985

TABLE 3. NUMBER OF MANITOBA INDUSTRIAL SERVICE FIRMS BY ECONOMIC REGION AND TYPE OF FIRM

ECONOMIC REGION	MACHINE SHOPS		WELDING SHOPS		REPAIR SHOPS		TOTAL	
	NUMBER	%	NUMBER	%	NUMBER	%	NUMBER	%
SOUTHEAST	4	6.1	15	12.5	12	8.1	31	9.3
SOUTH CENTRAL	4	6.1	10	8.3	10	6.8	24	7.2
SOUTHWEST	4	6.1	22	18.3	11	7.4	37	11.1
NORTH CENTRAL	3	4.5	11	9.2	7	4.7	21	6.3
WINNIPEG	41	62.1	49	40.8	94	63.5	184	55.1
INTERLAKE	6	9.1	2	1.7	8	5.4	16	4.8
PARKLANDS	3	4.5	5	4.2	5	3.4	13	3.9
NORTH	1	1.5	6	5.0	1	0.7	8	2.4
TOTAL	66	100.0	120	100.0	148	100.0	334	100.0

DATA SOURCE : MANITOBA SOURCING DIRECTORY

MANITOBA BUREAU OF STATISTICS

SEPTEMBER, 1985